

Dear RTO / Trainer System User,

Welcome to profile21 system,

This user guide describes the basic functions of the profile21 software application.



Login

Helpdesk Email

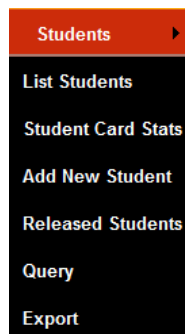
Go to the profiling website: www.profile21.com.au

⇒ Enter the username and password specified for your account

Navigation Links

Home

The latest news, tips and important links are available on this page.

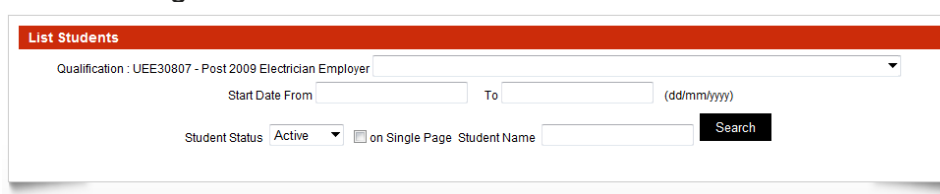


⇒ List Students menu option

Shows the list of students, their details and reports. You are able to search by name/ year/ week/ employer or leave all the fields blank to view all students under your RTO / Training Department.

Particular students can be searched by their employer, student name, start date of their profiling and the student's account status (Active/Archived/Blocked).

⇒ To view all students under your RTO, leave the fields clear and click "Search". The list will show the following details for each student:



The screenshot shows the 'List Students' search interface. It includes a dropdown menu for 'Qualification' (currently set to 'UEE30807 - Post 2009 Electrician Employer'), input fields for 'Start Date From' and 'To' (with a date format hint '(dd/mm/yyyy)'), a 'Student Status' dropdown (set to 'Active'), a checkbox for 'on Single Page', a 'Student Name' input field, and a 'Search' button.

⇒ A list similar to the one below will be produced:

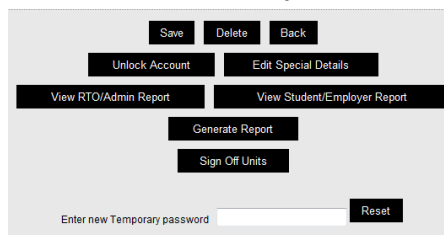
Student Name	Card List	Adv Std.	Start Date	ROI	Report	Select
30807-1 fdsa	cards	adv	12/Jan/2011	Yes	7 May 2012	<input type="checkbox"/>
30807-2 user	cards	adv	12/Dec/2011	Yes	7 May 2012	<input type="checkbox"/>
Monthly Card Test	cards	adv	01/Jan/2011	Yes	7 May 2012	<input type="checkbox"/>
Joe Bloqqs	cards	adv	01/Oct/2011	Yes	7 May 2012	<input type="checkbox"/>
Apprentice Holmesalen	cards	adv	01/Jun/2011	Yes	7 May 2012	<input type="checkbox"/>

Select the apprentice with checkbox and click on the appropriate button below.

Block User Access

⇒ By Clicking on one of the column headings you will sort the list by the column category. For example, to sort by Student Name in alphabetical order, click on the Student Name column heading

⇒ Click on the student's name to edit the student's registration details, reset passwords, unlock accounts and edit special details.



Buttons visible in the interface:

- Save, Delete, Back
- Unlock Account, Edit Special Details
- View RTO/Admin Report, View Student/Employer Report
- Generate Report
- Sign Off Units
- Enter new Temporary password (text input), Reset

Unlock Accounts button

⇒ Click the "Unlock Account" button.

Reset Passwords button

⇒ Type a new temporary password in the textbox provided

⇒ Click the "Reset" button (make sure to notify the student of new password afterwards).

Edit Special Details button

⇒ Click the "Edit Special Details" button.

⇒ To change a student's employer:

⇒ Click the "Change Company" button

⇒ Select the employer from the drop down list presented

⇒ Type in the start date with that employer in the textbox provided

⇒ Click the "Save" button

⇒ To release students for transfer to another RTO:

⇒ Click the "Release Student" button

⇒ Type in the date the student was released from your RTO in the textbox provided

⇒ Click the "Save" button

Student Name	Card List	Adv Std.	Start Date	ROI	Report	Select
30807-1 fdsa	cards	adv	12/Jan/2011	Yes	7 May 2012	<input type="checkbox"/>
30807-2 user	cards	adv	12/Dec/2011	Yes	7 May 2012	<input type="checkbox"/>
Monthly Card Test	cards	adv	01/Jan/2011	Yes	7 May 2012	<input type="checkbox"/>
Joe Bloogs	cards	adv	01/Oct/2011	Yes	7 May 2012	<input type="checkbox"/>
Apprentice Holmesalen	cards	adv	01/Jun/2011	Yes	7 May 2012	<input type="checkbox"/>

Select the apprentice with checkbox and click on the appropriate button below.

Block User Access

Searching for cards

From the main Card List screen, you can click the [cards](#) hyperlink under the [Card List](#) column for the appropriate student to be taken to a search options screen

⇒ Select the status/year/week to search for specific cards, or leave the fields clear to search for all the student's cards.

⇒ To view a specific card's details, click the period for the respective card.

Adv (Advanced Standing)

From the main Card List screen, you can Manage the advanced standing/RPL/PWR for a student.

⇒ Click on the "adv" for the appropriate student to view the student's current advance standing applied to his/her account.

⇒ *To add new advance standing:*

⇒ Click the "Add New Advance Standing" button.

⇒ Enter the start and end of the advance standing period to be applied to the account (the period range is inclusive).

⇒ Click the "Submit" button.

⇒ Enter the number of hours applied against each activity

⇒ Click the "Save" button.

⇒ *To view/edit advance standing:*

⇒ Click on "View/Edit" option to view the respective advance standing entry.

⇒ Use the textboxes to change any hours applied against the activities mentioned.

⇒ Click the "Save" button.

Start Date

From the main Card List screen, details of the student's start date for profiling will be displayed.

ROI

This column shows that the student has accepted the Release of Information agreement when he/she initially logged into the system.

Reports

View/download and print profiling progress reports.

Blocking User Access

Student Name	Card List	Adv Std.	Start Date	ROI	Report	Select
30807-1 fdsa	cards	adv	12/Jan/2011	Yes	7 Mar 2012	<input checked="" type="checkbox"/>
30807-2 user	cards	adv	12/Dec/2011	Yes	7 Mar 2012	<input type="checkbox"/>
Monthly Card Test	cards	adv	01/Jan/2011	Yes	7 Mar 2012	<input type="checkbox"/>
Joe Bloqqs	cards	adv	01/Oct/2011	Yes	7 Mar 2012	<input type="checkbox"/>
Apprentice Holmesqen	cards	adv	01/Jun/2011	Yes	7 Mar 2012	<input type="checkbox"/>

Select the apprentice with checkbox and click on the appropriate button below.

Block User Access

You may block a student from accessing the profile21 system.

- ⇒ Select the student(s) you wish to block by ticking the check box/es located under the **Select** column heading corresponding to the student/s name
- ⇒ Click the “Block User Access” button
- ⇒ Click the “Block Selected Users” button to confirm the action

⇒ Student Card Stats menu option

Student Card Stats

Search Students

Student Name

Qualification : UEE30807 - Post 2009 Electrician

From Year: Any

From Month: Any

To Year: Any

To Month: Any

Employer

☐ on Single Page

Back

Search

Particular students can be searched by their employer, student name, start date of their profiling and the student's account status (Active/Archived/Blocked).

Here you can see basic statistics for a student's card submissions. Particular students can be searched by their employer, student name, start date of their profiling and the student's account status (Active/Archived/Blocked).

To view all students leave fields clear and click search, or search by the following:

- ⇒ Student Name - first name OR surname of the student.
- ⇒ Period - time period range for the student's card(s).
- ⇒ Employer
- ⇒ To view all students under your RTO, leave the fields clear and click “Search”. The list will show the following details for each student:

Student Name	Pending Approval	Verified	Rejected	Draft	Cards Not Submitted	Start Date
Joe Bloggs	2	0	0	1	5	01/Oct/2011
30807-1 fdsa	0	0	0	0	17	12/Jan/2011
Apprentice Holmesqen	1	0	0	0	11	01/Jun/2011
Monthly Card Test	2	8	0	0	7	01/Jan/2011
30807-2 user	1	0	0	1	5	12/Dec/2011

Once you have brought up the student/s list, you can view the number of cards submitted/rejected/verified/re-submitted by the student:

The Search Results will show:

- ⇒ [Student's name](#) –Click on the student's name to view cards.
- ⇒ [Pending Approval](#)—indicates how many cards have been submitted for verification
- ⇒ [Verified](#)—indicates how many cards have been verified
- ⇒ [Rejected](#)—indicates how many cards have been rejected
- ⇒ [Draft](#) - Indicates how many cards were created as a draft, but not yet submitted to employer
- ⇒ [Cards not submitted](#) - represent a number of weekly/monthly cards that were not lodged by an apprentice since the start of his/her apprenticeship until the current date. The actual number of required weekly/monthly cards may be greater or smaller and it depends on a type of data submitted by an apprentice and the training package requirements.
- ⇒ [Start Date](#) – shows the start date of their Profiling. Click on this title to sort the list by start date.

⇒ Add New Student menu option

This option allows students to be registered onto the Profile21 system.

RTOs/ Trainers can use this function to register new students under your college or department. Here are clarifications for some of the fields used during registration:

- ⇒ [Registration](#) number - this is used to identify the student on the system. The registration number can have a combination of numbers and/or letters. For example, you can use your internal student ID number.
- ⇒ [Employer Details](#) - Select from the drop down list (If employer is not listed assign or add the business in the employer section first).
- ⇒ [Start Date](#) - Enter the start date of the student's initial employment.

The mandatory fields are indicated by asterisk symbol '*'.

Once all of the details are completed, click the SAVE button. The apprentice will be registered on the database and a password generated and shown at the top of the page.

⇒ Released students menu option

Transfer students to your RTO/ Trainer or reinstate a student you have released.

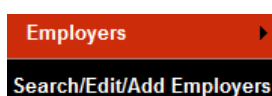
To reinstate or transfer a student to your RTO

- ⇒ Enter the student's surname OR first name in the textbox provided, and then click on "Search".
- ⇒ Select the student by clicking on their name.

- ⇒ Enter the attachment date, employer and the qualification in the spaces provided.
- ⇒ Click “Save”.
- ⇒ The student will be added to your RTO’s Profiling registration and to your next invoice.

⇒ Query menu option

Run an in depth query using employer/card status/Year/Week/Number of Cards/Student search parameters.



Shows the employer listings assigned to your College or Department User account. Here new employers can be added to the system or current employer’s details updated. Only those employers assigned to your user account are shown. An employer may be on the system but not shown in your list. Before adding an employer you need to find if it is already in the master list by running a search.

To find/add/edit/assign an employer

- ⇒ click on Search/Edit/Add Employers from the Employers menu
- ⇒ a search engine will appear
- ⇒ to find an employer of yours search by full or part of the business name.

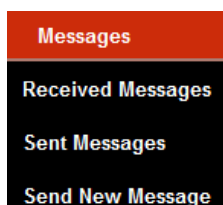
To edit an employer’s details or add a new employer user

- ⇒ Click on the company name in the list.

To assign a company to your user account

⇒ Click on Link/Create New Employer(s), search the employer, select the employer and click Link Existing Employer(s). Confirm your selection(s) by clicking on ‘Link Employer(s) to Your Organisation’ button. If you are unable to find the employer then go to create new employer.

⇒ Employer users can be added by clicking on add new user. Once their details are added and saved, the database will generate a temporary password.



Internal system messages can now be sent between your RTO/ Trainer, the employers, the students and profile21’s staff.

⇒ Received Messages menu option

View messages sent to your user account

- To view all messages, leave fields blank and click search, or complete the fields for more specific criteria.

⇒ Sent Messages menu option

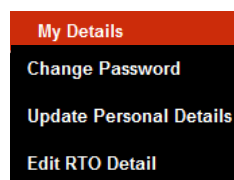
View messages previously sent from your user account

- To view all messages, leave fields blank and click search, or complete the fields for more specific criteria.

⇒ Send New Messages menu option

Send a new message to either a student or employer

- Select the user type and click “Find Users”. This will bring up a list of users for this category.
- Select the user and click “Create Message”.
- Complete the message and click “Send”.



⇒ Change Password menu option

When you first login to profile21, to commence profiling, it is a good idea to change your password for security reasons.

Make it something that you will easily remember. Passwords must be at least 6 characters long. Please note the password is case sensitive.

⇒ Update Personal Details menu option

Update your personal details on the system, i.e. email, phone number, etc.

⇒ Edit RTO Detail menu option

Update your RTO's details and add/edit your RTO's users on the system.

To Edit RTO Details

⇒ Click here to update the main RTO address, phone and email.

⇒ New RTO users can be added or edited and existing users can either be archived or blocked from using the system.

Set Qualifications

Set the default qualification for all search features on the system.

Logout

When you wish to exit from the system, select the “Logout” menu option and then [“Click Here”](#) to



RTO / TRAINER USER MANUAL

EPIC ITB - Suite 3, Level 2, 187 Boundary Rd
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F 03 9329 0014
E enquiries@profile21.com.au
W www.profile21.com.au
ABN 32 262 490 270

complete the logout process.